

The State Bar of California
Request For Proposal: Questions & Responses
WordPerfect Retirement Project
Vendor Pre-bid Conference

20. Do you want the vendor to include the costs of converting documents from WordPerfect to Word?

Yes please include the cost of converting the documents in Attachment A under "Document Conversion".

21. If so, how many documents will need to be converted? It states you have 70,000 documents, 50,000 of which are in your DMS and will not be converted. Does this imply that we will be converting 20,000 documents? Will these all be converted for pilot? If not, how many documents will be converted for pilot and how many for rollout?

The 50,000 documents are stored in the DMS system which will NOT be considered for conversion. The 70,000 documents was the number of documents in one of the departments being considered for the pilot phase. The 70,000 represents the gross amount because we will use a document decision matrix to arrive at a number to be converted during the pilot phase. We want to consider within the initial pool all of the WordPerfect documents that have built-in macros/intelligence. Another factor would be if these documents have been used within the last year. Other considerations might include legal requirements, long on-going investigations etc. The total number of documents to be converted should be considerably less than the gross. The pre-planning effort before the Pilot Phase start will jointly identify the number of documents to be in the conversion "pool".

22. What is the time frame for converting these documents?

The time frame must be within the specific phases of the project. For example, the documents selected for the Pilot must be converted during the Pilot Phase. The exact duration will be achieved once the contract has been awarded and a jointly developed project plan is generated and approved.

23. Do you want the documents converted on site or can we convert them off site?

The entire number of document must be converted on site.

24. Do you have any sample documents that we can use as a basis for estimating the cost?

We can not release documents until the Non Disclosure Application (NDAs) are signed. You can use the following list of the types of documents we deal with:

- *Pleadings*
- *Stipulations*
- *Executive Orders*
- *Decisions*
- *Legislative mandates*
- *Investigational Reports*
- *Judicial opinions*
- *Contracts*
- *Legal Briefs*

25. Under Statement of Work in Section D (page 9) it states "The user should see no change in the rules and alerts that they utilized in MS Outlook moving to the new version of MS Outlook"

We would like to have the vendor supply the The State Bar of California Information Technology Department the conversion configuration requirements to make the conversion seamless to the user. The State Bar of California and the vendor will test the parameters together to verify conversion. Our IT will be the ONLY personnel to make the changes to the user's computers.

26. Under Statement of Work in Section F, number 4, section a (page 12) is mentions your document assembly using macros/templates. Are these created internally or do you have a macro/template package? If so, what is the package?

We have a few templates developed internally. We would be open to a macro/template package as long as it preserves the styles and formats that are "Native" to Microsoft Word 2003

26. Under Statement of Work in Section F, number 5 (page 12) is states "Analysis of the current document lifecycle and workflow patterns to determine a 'best practice' records management strategy." Would you please clarify what vendor's role would be in this step?

To help us determine if our current record management system/strategy can be improved based on what your experience with other customers has been that follows best practices in the legal profession.

27. Can you please clarify what you mean by "General Staff?" What type of users make up this group?

General Staff refers to users who just need a basic understanding of word-processing. Topics might include the following:

- *Setting tabs in a document*
- *Using templates*
- *Creating tables in a document*
- *Formatting tables*
- *Working with table data*
- *"Drawing" tables in Word*
- *Applying and displaying styles*
- *Create a custom style*
- *Modify and delete a style*
- *Using styles to create document outlines*
- *Formatting text in a document*
- *Formatting paragraphs*
- *Working with indentation, numbered lists, and bulleted lists*
- *Creating Headers & Footers*
- *Working with document margins*
- *Working with sections*
- *Controlling page breaks*
- *Creating columns*